# Enable your team with Microsoft Lists

Your smart information tracking app in Microsoft 365

Daniel Glenn Shafina Hassam







01 Intro to Lists

02 Easily create, share and track lists

03 Rules and quick edits

04 Customize your lists

05 Demo time!





# About us



#### **DANIEL GLENN**

- Collaboration Practice Lead @ InfoWorks, Inc.
- Microsoft MVP & Podcaster 365MCS.com
- 80% humor, 100% Southern

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#### SHAFINA HASSAM

- Modern Workplace Manager @ BDO Canada
- Microsoft MVP
- Active bed to desk commuter

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### There is a lot of information

### to keep track of

28% Of a global information workers day spent, on average, creating, reading, or searching for information related to their job.<sup>2</sup>

4 hours Of time information workers saved per week from improved collaboration and information sharing.<sup>3</sup>



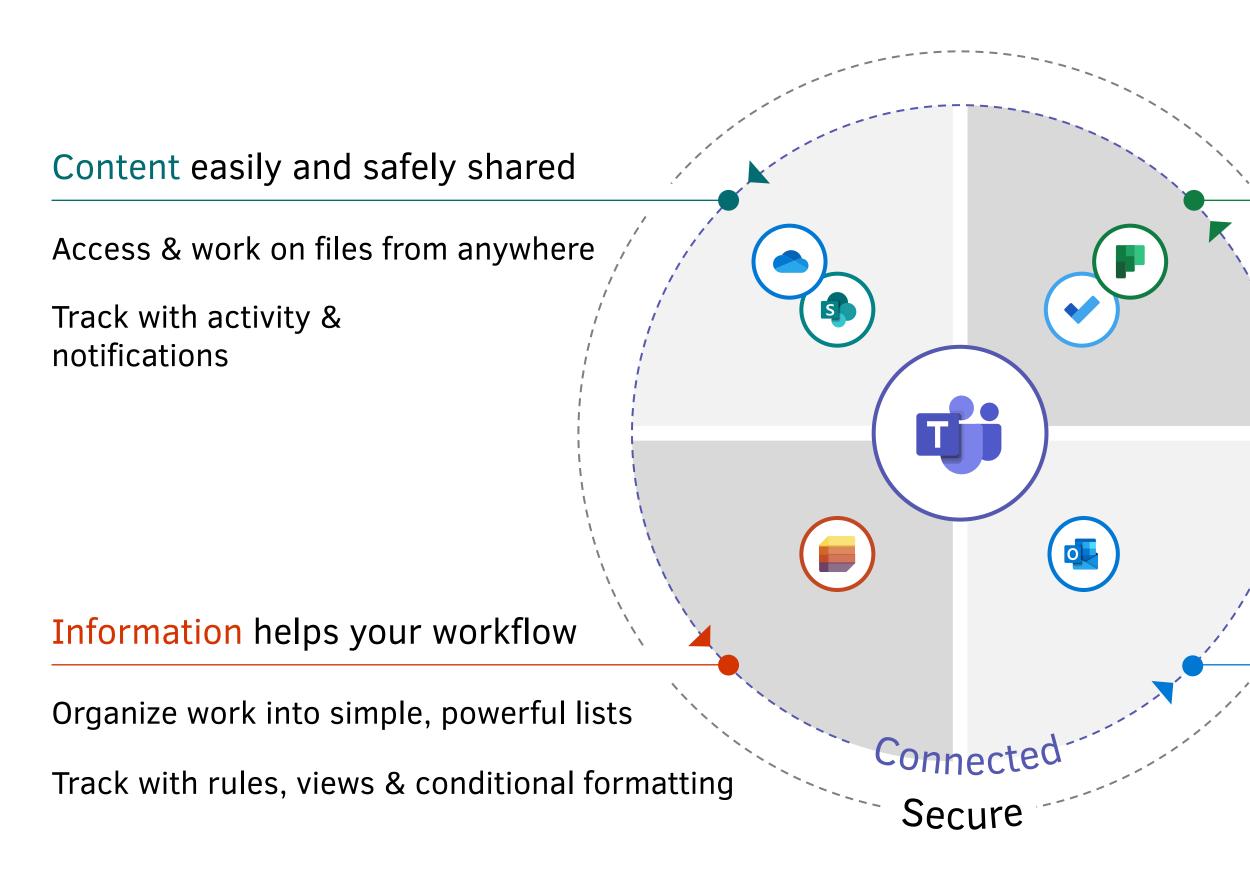
July 13, 2020 <sup>3</sup> The Total Economic Impact™ Of Microsoft Teams, a commissioned study conducted by Forrester Consulting on behalf of Microsoft, April 2019::

https://www.microsoft.com/en-us/microsoft-365/blog/wp-content/uploads/sites/2/2019/04/Total-Economic-Impact-Microsoft-Teams.pdf

## 98%

Of global information workers communicate or collaborate with one or more collegues.<sup>1</sup>

### Embrace working with Microsoft 365





#### Tasks are managed across apps

Drive team & personal accountability Create and assign tasks

#### **Communications** are in one place

Coordinate over chat, audio, video

Quickly schedule and attend meetings

Easily create, share, and track lists with anyone, on any device

#### Smart

Keep everyone in sync with rules and quick edits

#### Flexible

Customize your lists for whatever your business needs







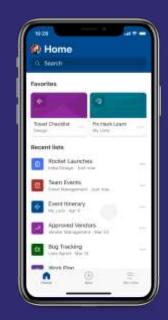
### Track what matters most



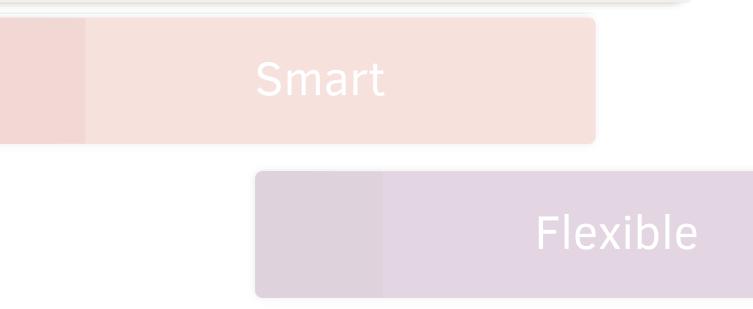




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# Easily create, share, and track lists with anyone, on any device



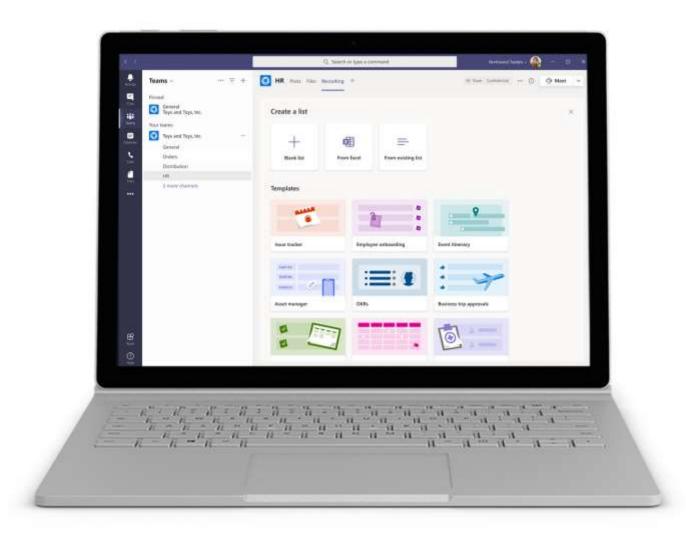
### Create a new list and share it with colleagues

#### Simple

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- Start from anywhere:
  - Lists app
  - Import a data table from Excel
  - Lists app in Teams
  - SharePoint
- Track issues, assets, activities and more
- Configure and refine with:
  - Filters and views
  - Color formatting
  - Ready-made templates



### Jumpstart your new list using ready-made templates



Simple

#### Start with a ready-made template

- Issue tracker
- Employee onboarding
- Event itinerary
- Asset manager
- Recruitment tracker
- Travel requests
- Work progress tracker
- Content scheduler

- Issue tracker: bring issues to a close by setting priorities and sending notifications
- Event itinerary: organize event details in one place and show as a calendar view
- Asset manager: track physical assets' location, status, users, etc.

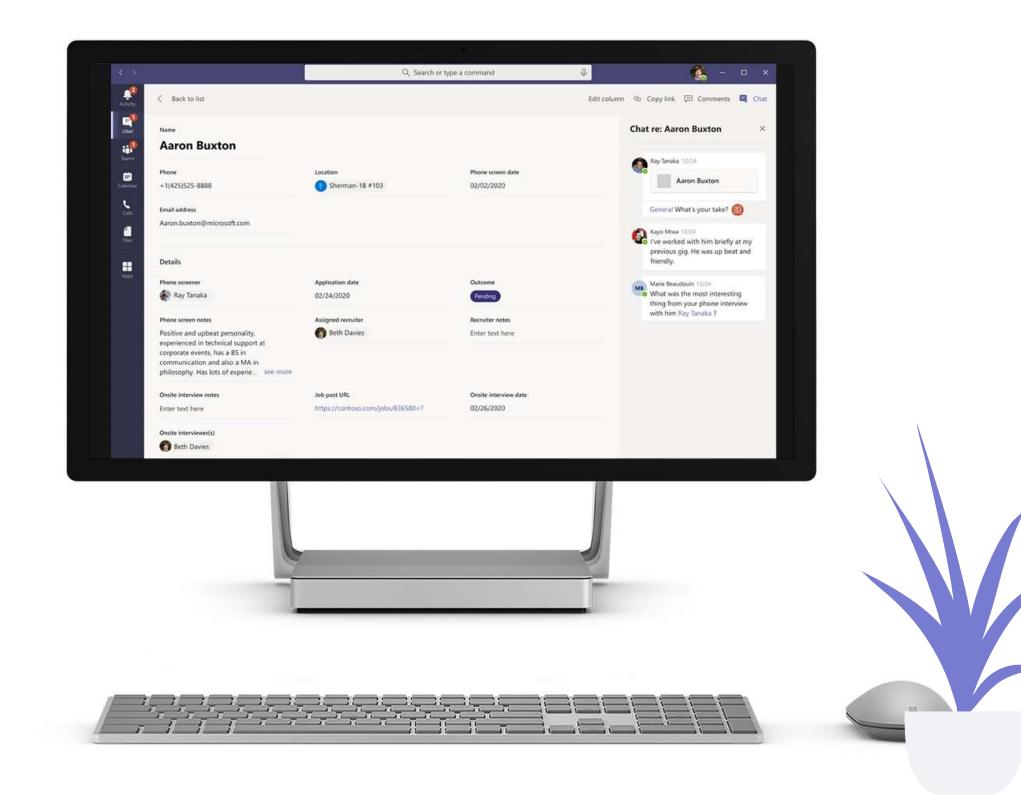


### Start and use a list from within in Microsoft Teams

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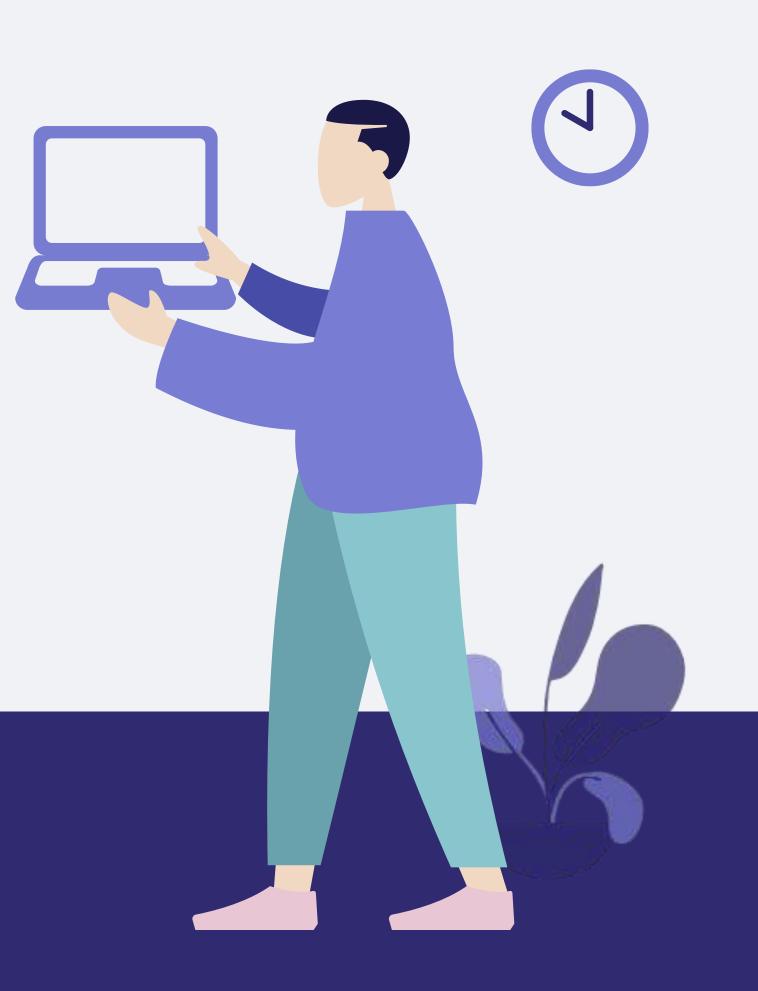
- Create new of bring in existing
- Start from a ready-made template
- Chat, @mention, and collaborate
- Share individual list items



## DEMO Lists home & create new

### Microsoft Teams 🐼 Microsoft Lists





### Smart

### Keep everyone in sync with rules and quick edits

#### Flexible

### Your lists just got a whole lot smarter

#### Smart

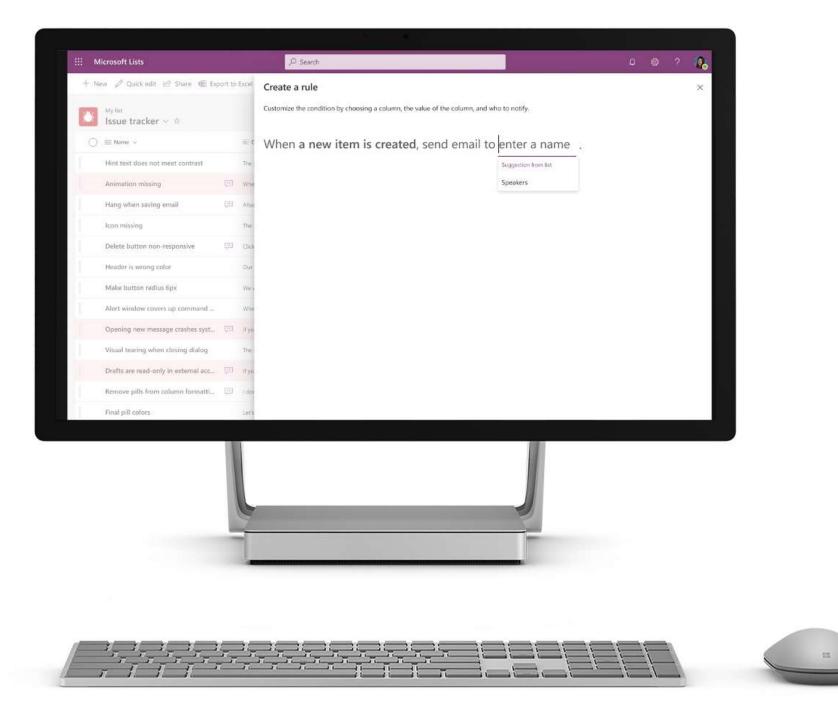
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Do more, work smarter:

- Quick Edit provides bulk edit operations
- Conditional formatting highlights data and focuses attention
- Rules and notifications keep everyone informed



#### Surface important information using rules and notifications Smart



- Created
- Modified
- Deleted

Assign notifications to specific recipients

#### Set rules to stay up-to-date on list progress Turn on notifications for when an item is:



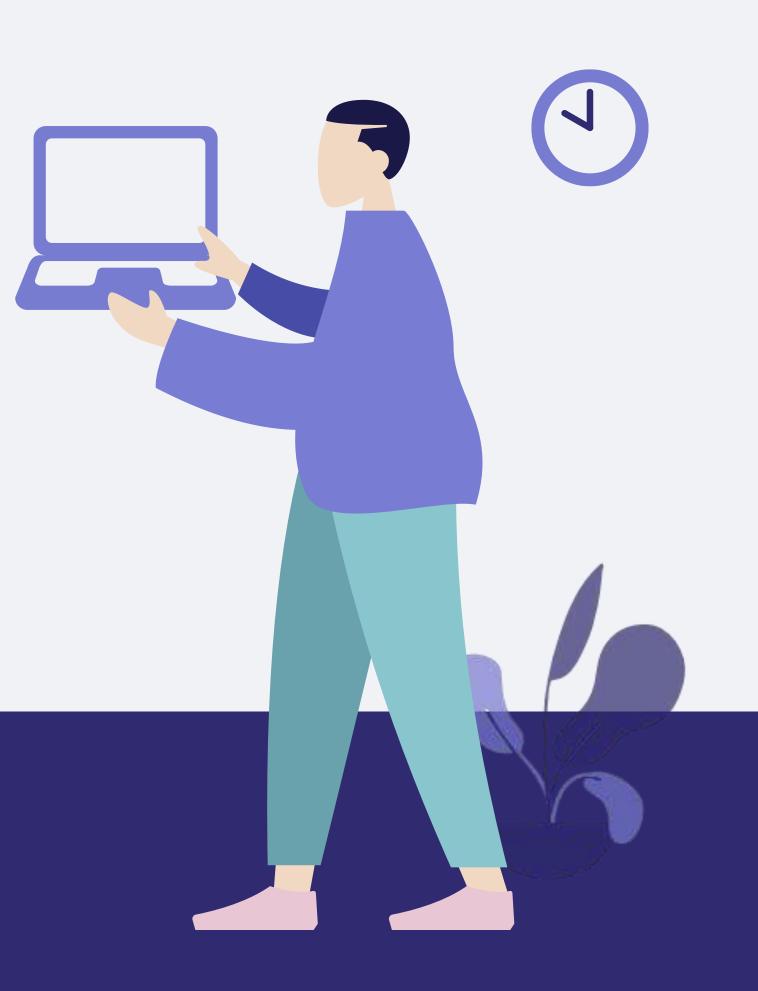


## DEMO

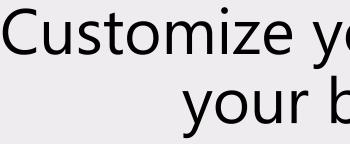
# Quick edits, lists rules and conditional formatting

### Microsoft Teams 🐼 Microsoft Lists





#### Smart

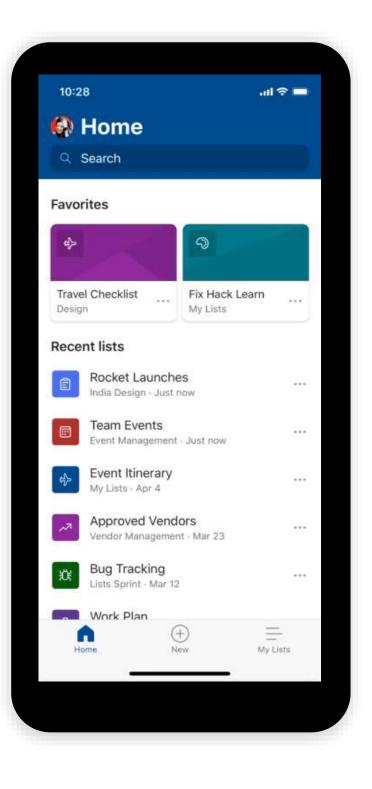




## Flexible

# Customize your lists for whatever your business needs

## Check your list anywhere with the Lists mobile app



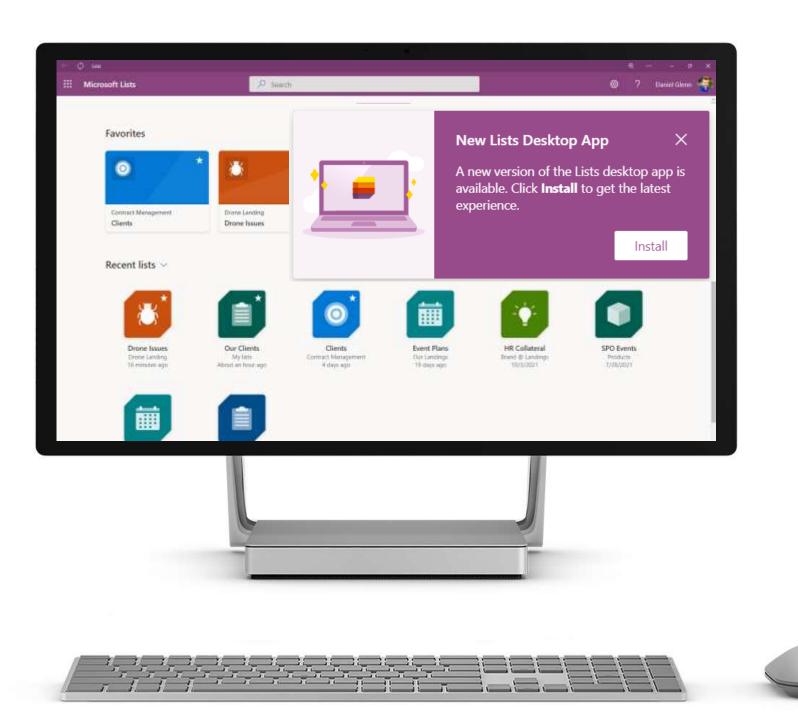
Flexible

- The full power of Microsoft Lists in your pocket Access all your recent and favorited lists • Create new lists using ready-made templates • Adjust columns, edit list items, and share as links

- Availability update
  - iOS (available now: <u>aka.ms/MSLists/app/iOS</u>)
  - Android (coming February 2022) [roadmap ID: 70704]

### Use your list with the Lists desktop app

#### Flexible



- Easy access to all your lists online and offline • Progressive web app (PWA) available to all your users • Familiar interface – it IS the List app • Easily add items, make edits, create new lists

#### Flexible

## Personalize your list with a few clicks

Default views help visualize your information:

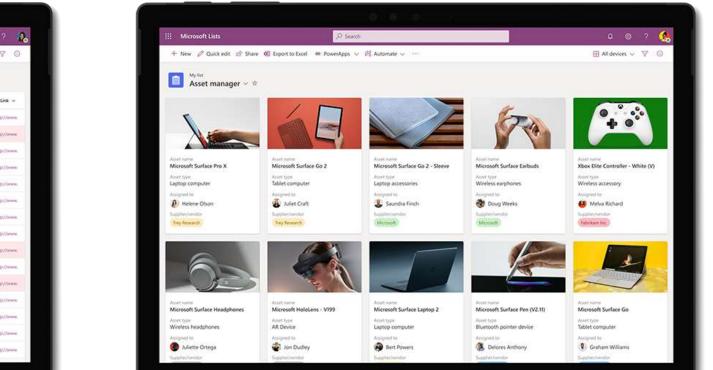
- Calendar
- Grid
- Gallery

- Conditional formatting
- Show/hide filters
- Header and footer customization

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Configurable formatting, views and forms promote your data with personality:



#### Flexible

### **Power Platform Flexibility**

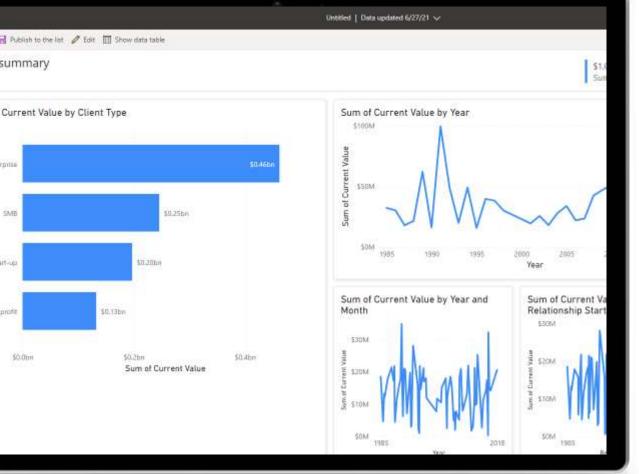
Integrated across Microsoft 365, such as Excel, SharePoint, Power Platform, enabling customers to build powerful solutions at a fraction of the time.

Forms with **Power Apps** and custom flows with **Power Automate** 

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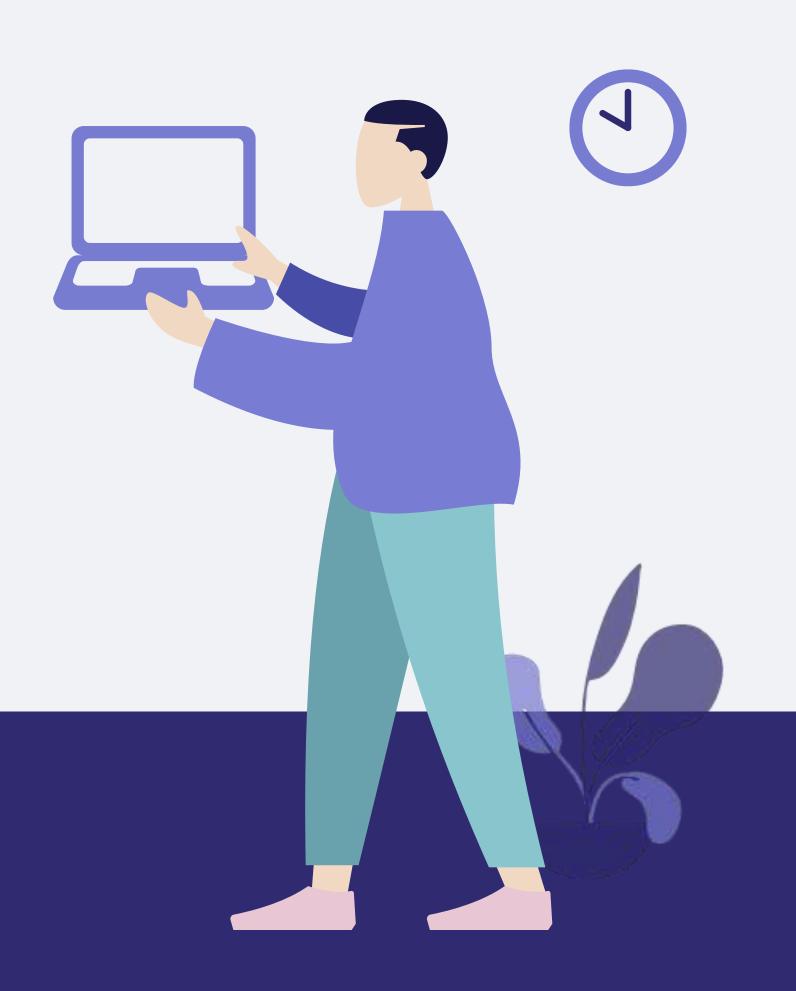
#### Visualize your lists with **Power BI**





## DEMO

#### Mobile access Views and forms Visualize with Power BI

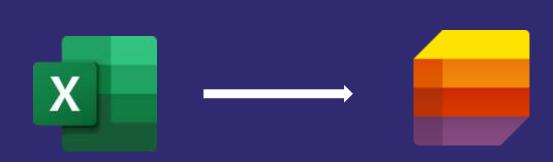


### Microsoft Teams 🐼 Microsoft Lists

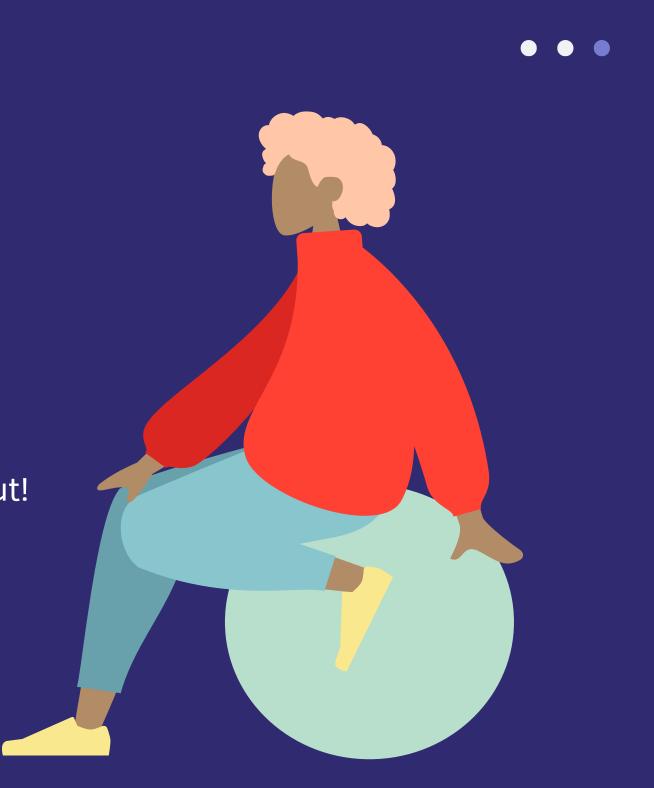




A real-life scenario!



- You manage an Excel sheet with multiple editors
- No one knows when the sheet has been edited
- Sometimes they receive a notification
- Sometimes users are editing offline and some times you get locked out!
- Keep track of updates and decisions made



## Resources

A plethora of resources out there!

### DanielGlenn.com/MN21



Blog aka.ms/MSLists/GA/blog



### **Resource Center**

aka.ms/MSLists

### Demo Video aka.ms/MSLists/demo-video

# Thank You!



#### Daniel Glenn @DanielGlenn





#### Shafina Hassam @atShafina

